# Preparing a batch - ftwPro 1099Wiz

11/24/2025 11:56 am CST

Follow the steps below to create a 1099 or 5498 batch, run necessary checks, and select the appropriate fulfillment options.

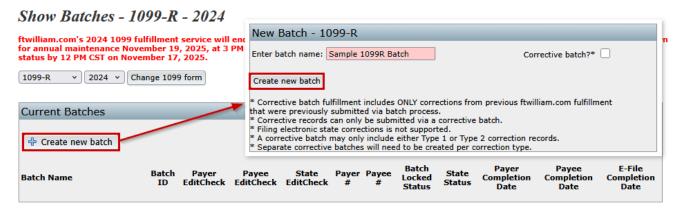
## Step 1: Create a New Batch

Click + Create New Batch in the upper-left corner of the Batch screen.

Enter a Batch Name of your choice and select Create New Batch.

This name is for your records only; the IRS does not see your naming conventions.
For corrective batches be sure to select the Corrective batch?\* checkbox in the right-hand corner. Refer to 1099 Corrections for additional information on corrective batches.

You will be redirected to the individual batch screen to select payers and payees.

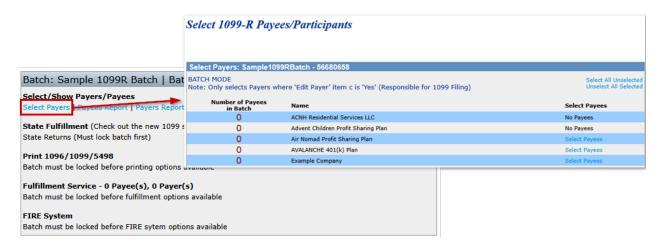


## **Step 2: Select Payers and Payees**

Click **Select Payers** in the upper-left corner of the batch screen.

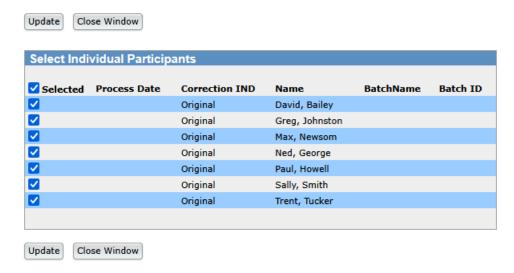
A window will display all available payers for your account. This window provides the following options for selecting which payers/payees to add to (or remove from) the batch:

- **Select All Unselected**: Adds all available payers and payees to the batch at once (only those not already in a batch).
- Unselect All Selected: Removes all payers/payees from the batch.
- **Select Payees**: Allows individual selection of payers and payees. If payees exist, a blue **Select Payees** link appears next to the payer name.



When manually selecting via **Select Payees**, a screen opens where you can choose all or some payees for that plan/payer. Click **Update** to save and close.

## Select 1099-R Payees/Participants



The number of selected payees will appear on the left side of the Select 1099-R Payees/Participants page.



## Step 3: Run Edit Checks and Lock the Batch

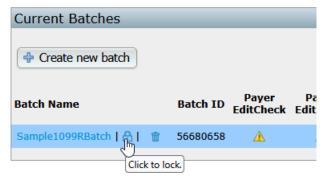
Important: Batches must be locked before fulfillment options are available.

To lock a batch:

• Click the Locked link under the Fulfillment Service heading.



• OR click the lock icon next to the batch name on the Show Batches page.



## Before locking:

All included payers and payees must pass edit checks. This option automatically populates when the Locked link/icon is selected.

- If edit checks have not been run, click Run Edit Checks.
- Once all checks pass (denoted by the **Ok** links), the option to lock the batch will be enabled and a warning: > "Are you sure you want to lock this batch? Once locked, participant information cannot be changed."

## **Step 4: Select Fulfillment Options**

Once the batch is locked, the following options become available:

- Print 1096/1099/5498: Generate PDF files or batch data for printing.
- Fulfillment Services: Authorize ftwilliam.com to e-file the batch and/or send paper copies to payees for a fee. See ftwilliam Fulfillment Services for details on fulfillment options.
  - Federal E-file
  - Print and Mail Services
  - State E-file

**NOTE**: State filings require separate edit checks and locking before enabling this option. *See State Fulfillment Services for more details.* 

• **FIRE File Download (if applicable):** Available for accounts with a **TCC** entered in the profile. (*See Preparing a .txt file for FIRE for more details.*)

## Batch: Sample1099RBatch | BatchID: 56680658

## Select/Show Payers/Payees

Payees Report | Payers Report

State Fulfillment (Check out the new 1099 state charts and technical documentation in our 1099 User Guide)

State Returns | Lock State Returns | ???

#### Print 1096/1099/5498

1096 | Copy A 2-up | Copy B, C, 2 (Blank) | Copy 1 State (Blank)

## Print Payer Copies (includes background image)

1096 | Copy A

#### Fulfillment Service - 7 Payee(s), 1 Payer(s)

Federal/State/Payee Fulfillment Not Available - State returns must be locked

Federal/State Fulfillment Not Available - State returns must be locked

State Fulfillment Not Available - State returns must be locked

Federal/Payee \$33.95 (2.40)

Federal Only \$23.80 (0.95)

Payee Only \$28.35 (1.60)

#### FIRE System

Download 1099-R Data for FIRE System | Review FIRE Data File | 1099 E-filing Information